



New Zealand's red meat sector:
**Our priorities to support a prosperous
New Zealand for all Kiwis**



beef+lamb
new zealand

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Meat Industry Association

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New Zealand's red meat sector is known worldwide for producing premium beef and lamb – raised with care, naturally nutritious and trusted by customers in more than 100 markets.

This success is built on a partnership between farmers who raise animals as nature intended, and processors and exporters, who add value, uphold the highest standards and deliver New Zealand beef and lamb and other products to the four corners of the world.

The sector has a proud record of innovation, with productivity gains behind and beyond the farmgate unmatched by any other industry.

This is not simply an agricultural story – it is an economic one.

The red meat sector is an economic powerhouse, generating export revenue of more than \$12.6 billion in the year to 31 December 2025 and contributing \$15.4 billion to GDP.

Importantly, this income flows back not just to the New Zealand economy, but regional and rural communities through the people directly and indirectly working in the red meat sector.

The red meat sector does a lot to help end domestic food poverty and secure food security for New Zealanders by contributing to charitable organisations. Many processing companies have their own philanthropic schemes while others support existing organisations such as Meet the Need and the New Zealand Food Network. There is still significant scope to grow further.

To keep delivering for New Zealand, our sector needs investment into science and extension, as well as practical, enduring and enabling regulatory settings that support productivity, encourage innovation and help strengthen our position as a world-leading producer of premium, sustainable food.

In July 2025, we released *Our Pathway to Growing Value*, the sector's joint strategy that outlined key areas for focusing investment. Realisation of these initiatives could see the sector grow from \$12.6 billion today to as much as \$24 billion by 2035.

However, we are also living in a period of increasing uncertainty, protectionism, and volatility – much of which is outside of our control. The impacts of this are real and flow back through communities. The most recent conflict in the Middle East is evidence of how global events can impact our sector.

What we are asking from the Government is predictability and certainty in the areas we can control, to help navigate the turbulent environment that we operate in.

While the sector currently has access to more than 100 markets, a diverse trade strategy is essential to help weather changing market conditions. New Zealand must do all it can to seize emerging opportunities – particularly in high potential markets such as India. This diversity gives the sector greater choice and resilience, strengthening farm gate returns and supporting the national economy.



**Kate Acland, Chair,
Beef + Lamb New Zealand**



**Nathan Guy, Independent Chair,
Meat Industry Association**

Red meat sector stats



121,000
New Zealand jobs



5%
of total national
employment



More than
\$12.6b
in export revenue

Our priorities at a glance



Protect and enhance market access through trade and biosecurity.



Enable reliable and affordable energy, fuel, fertiliser and key farm inputs for regional industry.



Create a streamlined and predictable resource management system.



Deliver practical, outcomes-based rules for freshwater that recognise natural variations in catchments and are underpinned by science.



Focus on the protection of truly significant biodiversity and recognise and reward farmers as custodians of our precious natural environment.



Maintain credible globally-aligned climate policy backed by the latest science.



To protect food production, stop the wholesale conversion of sheep and beef farmland into carbon farms.



Build a skilled workforce through training and smart immigration settings.



Invest in innovation and value growth across the sector.

Red meat sector's plan for growing value

Our Pathway to Growing Value Action Plan



VISION – Creating a high-value, resilient red meat sector that thrives through change by seizing every opportunity to deliver greater value across the supply chain



GOAL – Ensure long-term profitability and resilience for meat processors and farmers through sustainable practices and value chain efficiency



PRIORITY AREAS

Enhancing On-Farm Productivity
Unlocking productivity gains at the farm gate

Spotlight on China
Amplifying our first mover advantage

Address Non-Tariff Barriers
Removing costs to add further value

Leverage Market Opportunities
Growing value by developing new revenue streams

Enabling Domestic Settings
Regulation to support productivity, efficiency and growth

Creating Value From the Carcass
Exploring opportunities for new products



OUTCOMES

Higher farm productivity and profitability
Sector's low environmental footprint is recognised and acknowledged with fit-for-purpose regulation settings to provide for headroom and support growth

Taste Pure Nature preference measures
Export revenue increased
Streamlined regulatory settings support ease of trade
Enhanced product diversification

Non-Tariff Barriers have reduced
Trade is maintained in key markets
Risk of trade impediments is reduced

Tariff costs are reduced as industry takes advantage of tariff free access
Market share growth to support market diversification
New products add value to the whole animal

Innovation is unlocked
Migrant and sector labour capacity increased
Economic contribution increased
Environmental KPIs are reasonable and fit-for-purpose



KEY ENABLERS

Food Safety
World leading food safety standards and regulatory settings to maintain New Zealand's reputation as a producer and exporter of safe, high quality food, and to maintain customer confidence

Innovation
Value of our products is supported by substantiated attributes and credentials
Productivity and efficiency is enabled by R&D, innovation and automation

Collaboration
Working sector-wide, cross-sector, and with Government to build strong relationships and understandings
Co-investment on key priorities

World Class Farmers
Supporting farmers to deliver world-class performance on-farm now and into the future

Sector priority

Trade



Trade is fundamental to the future prosperity of New Zealand.

Global demand for our products remains strong, and despite reduced export volumes, the outlook is positive.

However, the erosion of global trade rules and a rise in protectionism makes free trade agreements and the protection of current market access more important than ever.

The successful passage of the India FTA through Parliament is critical. It will remove key barriers, including the 30 percent sheepmeat tariff, provide a legal framework to address non-tariff restrictions, and level the playing field with Australia.

The global trade environment remains unpredictable, with rising tariffs, safeguard actions, and ongoing non-tariff barriers adding cost and limiting export growth. This is against a backdrop of increasing geopolitical volatility.

Strong relationships matter more than ever. The sector is committed to working closely with government and international partners to protect market access, resolve barriers and provide a stable environment for investment and increased export value.

Our solutions

- Support the passage of the India FTA.
- Be ready to pivot and invest resources as new bilateral trade issues (such as safeguard action) arise to maintain current access.
- Continue to work on the resolution of long-standing non-tariff barriers.
- Protect and extract further value from New Zealand's existing network of trade agreements by negotiating systems recognition and mutual recognition agreements to address NTBs and tariff barriers.
- Continue support for a strong international rules-based framework, including through the WTO and other multilateral fora.
- Continue to support the New Zealand red meat brand through the Taste Pure Nature programme to help lift the value of exports into China and other high value emerging markets over time.
- Increase support for in-market trade promotion activities through NZTE alongside industry partners to maximise value from New Zealand's FTA network.
- Avoid introducing non-tariff barriers to trade that could impact our position in export markets, particularly in regard to animal welfare or sustainability.

Sector priority

RMA – Water and Biodiversity



The Resource Management Act (RMA) is one of the most significant pieces of legislation for the whole sector as it impacts on both farm operations and the capacity of our regional processing network.

It shapes how productive resources are used and whether farmers and processors can invest with confidence.

New Zealand's natural, low-impact sheep and beef farming practices are world leading for their efficiency, productivity, and sustainability. Our sector has an outstanding track record of producing more from less.

Almost a quarter of New Zealand's total native vegetation is on sheep and beef farmland.

Our processing plants have made major gains in water efficiency and wastewater management in recent years.

The current RMA framework is complex, costly and unpredictable.

We strongly support reform that delivers a streamlined, practical system – one that achieves environmental outcomes while enabling growth, innovation and investment.

This is a once in a generation opportunity to reset the system and it is critical that we get it right.

We are concerned that councils set aspirational environmental limits far beyond what is required that have significant economic implications for agricultural business and their communities.

Our solutions

Water:

- Increase funding for catchment communities to support their work at grassroots to drive collective improvement of water quality.

Limit setting:

- Where limits are required, they should be outcomes-based, achievable and realistic.
- The suspended fine sediment and 95th percentile *E. coli* limits under the Freshwater National Policy Statement (NPS) 2020 need to be removed.

Independent research found the suspended fine sediment and 95th percentile *E. coli* rules under the Freshwater NPS 2020 were unachievable. Even if all agriculture was removed, up to 38 percent of rivers would still not have met the suspended fine sediment rules as they were too stringent and there is so much natural variation across the country.

Market based systems:

- The RMA should not enable the establishment of tradeable rights to individual farms, cap and trade systems, or resource levies for freshwater.
- It is difficult to accurately measure losses (like phosphorus or nitrogen) at the farm level and there are many overseas examples where water allocation has led to perverse outcomes where a small number of entities hold a majority of the water.

Farm plans:

- Research shows every farmer in a catchment having a farm plan can drive significant improvements. However, the amount of regulatory oversight and work/cost required **must** reflect the different risks of farming activities.
- Being able to use a certified farm plan instead of requiring a consent is positive. The certification, however, should only cover the “high risk” activities that would have required consent.
- Most sheep and beef farmers do not currently require a consent. The farm plan framework should not place more requirements on farmers than they currently face and low risk farms should not have to do an audited and/or certified farm plan.
- Farmers should not have to do multiple plans. Existing industry plans that met an agreed standard should be recognised as equivalent and Regional Councils should not be able to develop their own plans.

Biodiversity:

- Implement a biodiversity framework that is flexible, practical and focused on truly significant ecosystems at the national level rather than a regional level.
- Ensure the definition of Significant Natural Areas (SNA) covers only the most truly important biodiversity and that even if a farm has a SNA there is flexibility in the activities they can do on that land.
- Recognise and support farmers for the vital role they play in protecting and enhancing native habitats. Increase funding into QEII National Trust covenants as this is a highly effective mechanism for encouraging and rewarding farmers for protecting their biodiversity.

Sector priority

Critical Input Disruptions



The red meat sector operates at the intersection of agricultural production, heavy industry, and export logistics, making it highly exposed to national energy security issues, particularly fuel availability, electricity reliability, and price volatility.

Energy security risks have intensified in recent years, compounded by geopolitically driven fuel supply disruptions, most notably those associated with the Iran conflict.

These risks extend beyond direct energy use to include fuel-dependent inputs such as fertiliser, where allocation and distribution settings have significant farm-level impacts.

These pressures disproportionately affect energy intensive and regionally distributed sectors such as red meat. Diesel is especially critical, enabling livestock transport, farm machinery, inter-plant logistics, the movement of meat to ports and shipping. Any disruption to diesel availability or distribution, therefore, cascades quickly across the supply chain, constraining both energy use and essential farm inputs.

Food production and processing cannot be quickly reduced without serious animal welfare, compliance, and economic impacts, making most energy use in the red meat sector non-discretionary. The same applies to time-critical agricultural inputs, such as nitrogen and maintenance fertiliser, which are applied within

narrow windows to secure feed supply and protect animal welfare across seasons.

Remote farms are more exposed to distribution constraints, meaning that centrally applied allocation rules, whether for fuel or fertiliser, can bite earlier and harder in practice than headline national supply indicators suggest.

For meat processors and renderers, fuel choice is often constrained to natural gas (where infrastructure exists) or coal, while electricity demand is also significant. Refrigeration systems alone can account for up to half of a site's total electrical use.

Fertiliser demand is not uniform across farms or seasons. Allocation approaches based solely on historic purchasing patterns or average seasonal demand risk misallocating supply and impacting animal health and welfare.

Given tight processing margins and seasonal peaks in demand, energy price volatility, fuel security, and critical inputs allocations pose growing risks to sector viability.

Addressing vulnerabilities in New Zealand's energy system therefore requires a coordinated, cross-party approach that leverages renewable resources, strengthens long-term resilience, improves demand flexibility, and minimises price volatility.

Our solutions

- Policy and response settings, particularly for diesel and associated fuel-dependent inputs, must reflect the sector's limited ability to reduce demand without immediate and material consequences for animal welfare, production continuity, and market access.
- Fuel and fertiliser response mechanisms must operate effectively in rural and regional contexts, recognising constrained infrastructure, limited alternatives, and the central role of diesel across the

entire supply chain. Emerging distribution challenges, for both fuel and fertiliser, reinforce the need for tailored, regionally responsive implementation.

- Fuel and energy settings must support the continuity of the entire red meat system, including on farm operations, feed and fertiliser application, processing facilities, transport corridors, ports, and essential supporting services. A whole of system approach is necessary to prevent cascading disruptions that amplify animal welfare, workforce, economic, and market access risks.

Sector priority

Climate Policy



The carbon footprint of New Zealand beef and lamb from farm to plate is among the lowest in the world, with absolute emissions reduced by 32 percent since 1990 while production has remained stable.

Our sector is committed to further progress. Since 2003, the red meat sector has invested over \$90 million in the Pastoral Greenhouse Gas Research Consortium to reduce agricultural emissions. A more recent private sector and government partnership, AgriZero, has invested a further \$190 million.

A 2024 independent report showed virtually all countries incentivise agricultural emissions reductions by paying farmers rather than pricing their emissions. With practical tools available, and more on the way, the focus should be on supporting farmers to implement solutions rather than re litigating targets, which risks distraction and disengagement.

We support New Zealand remaining part of the Paris Agreement. Several of our highest value free trade agreements rely on credible climate commitments, and pulling out of this Agreement would have real consequences for our export revenue.

We support the amended methane targets – a 14-24 percent reduction by 2050 from 2017 levels – which ensure agriculture adds no additional warming, aligning with net-zero targets for carbon dioxide and nitrous oxide.

Since 2017, more than 300,000 hectares of sheep and beef farmland has been converted to forestry, driven by carbon credit returns. While we welcome restrictions on whole-farm conversions entering the ETS, we are concerned they do not go far enough: our modelling shows up to 1 million hectares could still be lost by 2050, threatening food production, rural communities, and long-term sector sustainability.

Our solutions

Climate Change:

- Maintain New Zealand's warming based targets set for biogenic methane.
- Amend New Zealand's international commitments to take a split gas approach that aligns with its current domestic targets, providing certainty to the sector about what New Zealand is seeking to achieve.
- No pricing of agricultural emissions in line with our global trading partners.
- Provide incentives for methane reduction technologies and practices.
- Continue to co-invest with industry into methane reduction tools and fund adaptation research.
- Greater recognition of the sequestration on farms, including pre-1990 natives.

Carbon Farming:

- Focus on gross CO² reductions, rather than relying on offsetting to meet net zero targets.
- Restrict whole farm conversions on land classes 7 and 8.

- Review the role of forestry in the ETS including stronger limits on carbon-only farming in permanent land categories.
- Require forest owners to appropriately manage pest and fire risks to neighbours.
- Review the policy settings regarding the ability of international companies to purchase New Zealand farmland for conversion to forestry.

Energy:

- New Zealand's energy sector must provide secure, reliable, and affordable energy, enabling meat processors to operate sustainably, remain competitive and continue adding value to exports.
- Continue to support the processing sector transition away from fossil fuels to renewable energy.
- Strengthen rural resilience by increasing farmers' ability to generate, use, store, and fairly sell renewable electricity, while investment in legacy networks is maintained.
- Improve consenting to support farmers' ambitions to contribute to the development of renewable energy infrastructure.

Workforce and Industrial Relations



People are our most important asset and the sector needs a workforce with a wide range of skills to keep operating efficiently.

As well as roles on-farm and on processing plant supply chains, it also needs tertiary school graduates with the required skills to lead us into the future, and people with offshore market experience to identify where our products will make the best return for farmers and the national economy.

While the sector aims to employ New Zealanders first and foremost, during the peak months of the processing season the demand for these roles exceeds the available workforce in New Zealand. Immigration is therefore a crucial issue for the sector.

Improving the ability to employ migrant workers means processors can ensure shifts run at maximum capacity and employ more New Zealanders. For example, one migrant boner supports two trimmers, who in turn support three or four packers. The trimmers and packers are usually New Zealanders.

Education:

Education is critical to a productive and profitable red meat sector. Agribusiness is a vital piece of New Zealand's economy and should be adequately recognised in our education system.

The urban/rural divide will continue to grow unless children are taught from an early age where their food comes from and New Zealand's position as a trusted supplier of food. Agriculture should be appropriately recognised and supported throughout the education system from primary school through to tertiary and vocational training.

Industrial relations:

The red meat sector is committed to working with government to co-design facilitative policies and regulations without adding to the cost of doing business and creating unintended consequences.

One example of this is the Regulatory Inspection and Supervision programme, which is a key priority for the industry and responds to ongoing workforce pressures, evolving technology, shifts in global meat inspection systems and the need to maintain world class food safety and market access while improving system resilience.

Our solutions

Regulatory Inspection and Supervision:

- Support MPI and industry in the delivery of the Regulatory Inspection and Supervision Programme including:
 - Finalisation and implementation of updated Animal Products Notices relating to inspection and supervision requirements for meat exports and any transitional provisions to ensure continuity of service across the industry.
 - Implementation of red meat examination qualifications and approval of training providers and programmes.
 - Development and commencement of veterinary supervision trials.

Education/training and skills development:

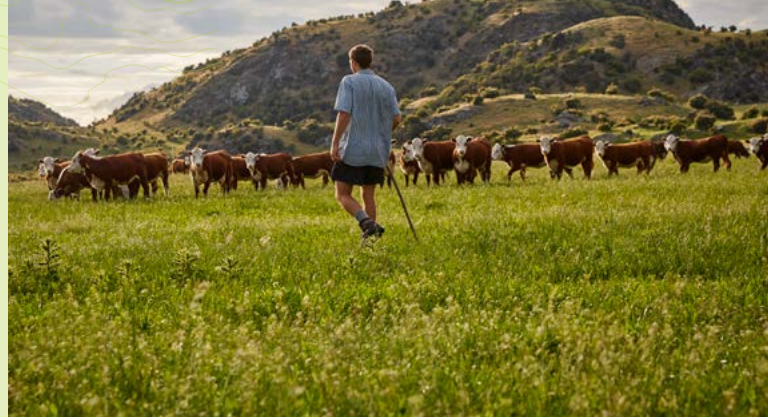
- Continue support to attract and retain people to work in the red meat sector.
- Increase funding of work and provider-based vocational training to meet the strategic needs of the red meat sector and make work-based learning eligible for student loans.
- Agriculture is included in the primary school curriculum across New Zealand (e.g. through initiatives such as Farmer Time) and Agribusiness is a core part of secondary schools' Business Studies curriculum.

Immigration:

- Ensure immigration settings provide industry with the flexibility to fill labour and skill shortages and recognise the multiplier effect of being able to employ more New Zealanders.
- Ensure that visas are processed efficiently and without undue delay to ensure workers can be in New Zealand at the right time in the season.

Sector priority

Biosecurity



The incursion of pests and diseases into New Zealand is a major risk to the sector. For example, the incursion of Foot and Mouth Disease would be catastrophic to rural communities and the New Zealand economy.

New Zealand's geographic isolation, combined with robust government-industry funding partnerships, means we are in a strong position to respond to pests and diseases.

Significant progress has been made towards the elimination of *Mycoplasma Bovis* and bovine tuberculosis in the cattle population.

We remain committed to working with the government and industry partners to improve other aspects of New Zealand's biosecurity

capability, including legislative design, livestock traceability, disease surveillance and vertebrate pest management.

Our solutions

- Continued government funding of strong biosecurity systems at the border and preparedness for, and responses to, incursions of exotic pests and diseases.
- Partner with industry in the implementation of mandatory mob-level electronic tracing for sheep (e.g. eASDs).
- Adoption of an updated Bovine TB National Pest Management Plan (currently under development) and continued funding of the scheme up to and beyond 2031.
- Close engagement with industry on the amendments to the Biosecurity Act (currently under review).

Sector priority

Animal Welfare



New Zealand has some of the world's highest animal welfare standards and farmers and meat processors work hard to ensure their animals are well cared for and treated humanely.

We are committed to maintaining our high standards by continually reviewing and improving commercially driven assurance programmes and regulatory requirements in partnership with government.

Our solutions

- Continued support for compliance and enforcement activities to ensure that New Zealand's reputation and market position with consumers globally is maintained.
- Take on board industry feedback on the Code of Welfare: Sheep and Beef Cattle.

Sector priority

Innovation, Research and Development



The primary sector is the backbone of New Zealand's economy and sustained investment in research and development is crucial to maintaining our footing and increasing productivity across the supply chain. The science sector must have room for green fields thinking, to leverage our global science relationships to maintain our position on the world stage.

New Zealand's shallow investment pool and low levels of private enterprise in R&D makes it challenging to attract long-term investment in

science capability. This means the Government plays a particularly important role in supporting the sector. Advanced technology for agriculture is on the rise, and with a proven history of innovation and resourcefulness, smart technology is one way New Zealand can stand out from competition and move up the value chain.

The red meat sector advocates strongly for science-based evidence in the development and implementation of standards and it is crucial we have a robust science system that backs that up.

Our solutions

- Ensure there is a targeted and well-funded national strategy for R&D and innovation that is responsive to industry needs and able to support innovative transformational projects (for example, use of AI in processing plants).
- Ensure the funding system supports the variety of agricultural research providers across New Zealand as well as the Bioeconomy Science Institute.
- Support the sheep and beef industry's vision to double export value by 2035 through co-investing in a programme to drive further productivity improvements through genomics, transformative technologies (AI) and tackling parasite resistance.
- Continue support for beef and sheep innovation programmes through funding mechanisms such as the Primary Sector Growth Fund.
- Streamline the process for application and registration of veterinary pharmaceuticals and agricultural herbicides and pesticides under the Animal Compounds and Veterinary Medicines Act.
- Create and support a system that prioritises the retention of New Zealand scientists, encourages our best and brightest scientists to stay (or return), and attracts quality scientists from abroad to work on key issues that affect New Zealand.
- Consider streamlining funding processes (which can take several years) to move with the technology and ensure New Zealand is positioned to act on current and emerging developments and technology.

- The red meat sector is recognised as the heart of New Zealand's bioeconomy and government and industry work in partnership to ensure the waste products from red meat processing are reserved as organic material that can feed the transition to biogas as well as creation of a completely circular system.

National Nutrition Data

New Zealand has not conducted an Adult Nutrition Survey since 2008/09, despite significant global shifts in eating patterns. Growing concern about climate change has increased the emphasis on environmental sustainability and plant-based diets, sometimes at the expense of nutrient efficiency. At the same time, the use of GLP 1 medications is rising, and a growing global middle class is driving increased demand for nutrient-dense, high quality protein.

Up-to-date national nutrition data is critical to support innovation and evidence based decision-making. Without it, there is a risk that nutrition guidelines and health policy are based on outdated information that does not reflect current eating patterns in New Zealand.

The red meat sector sees a strong need for a new Adult Nutrition Survey to provide contemporary data on New Zealanders' diets and to inform future policy development.